

CA Project Management Methodology

Getting Started Summary

Microsoft Excel® Basics

1. Knowledge of Microsoft Excel® basics is required to operate the template file. All formulas and macros are in place. However, errors can be made and work can be lost if Excel® basics are not followed. In particular, be able to enter and edit text in a field.

Getting Started

2. If there is virus protection on the system, it could take up to 30 seconds for the file to open. If you are using Excel 2003, a dialogue box should appear asking you to enable macros. Please do so. If you do not see the dialogue box or button regarding macros close the file and check the security setting on your system. Click on Tools/Macros/Security and change the setting to medium. Reopen the file, enable macros, and the file will be ready for use.

In Excel 2007, once the file is open, press the Options button after the "Macros have been disabled" Security Warning, then select the Enable Macros button.

3. Save a "clean," reference copy of the file on your hard drive or server. If a copy of the file is maintained on the organization's server, regularly check for updates.

4. To begin work on a new project, save a copy of the "clean" template file to your desired location with a name that is appropriate for the project you are working on.

Toolkit Contents

5. There are two toolkits:

- Concept – consists of a template for the Concept Statement and an estimating tool
- CA-PMM Toolkit
 - A "Template Inventory and Description" worksheet
 - A "Project Information Sheet"
 - Other worksheets, each containing one of the CA-PMM templates.
- In addition, there are excerpts from the CA-PMM Toolkit to allow for multiple uses.

6. Each worksheet is protected. You will not need to unprotect the worksheets for normal use, and we recommend that you not do so. You will need to unprotect the sheet only if you wish to make changes in the worksheet format, such as adding rows, or adding other fields to customize the form for a specific use.

Excel 2003: To unprotect the worksheet, click on Tools, Protection, Unprotect Worksheet. To protect the worksheet when you are ready, click on Tools, Protection, Protect Worksheet. You will see a dialogue box that has a list of permissions. The default is that two options are checked: Select Unlocked Cells and Edit Objects. Click OK and the worksheet will be protected.

Excel 2007: Click on the Review tab, Changes Group, then click on Unprotect Sheet. To protect the worksheet, click on the Review Tab, Changes Group, and then click on Protect Sheet.

Workbook Navigation

7. The Template Inventory worksheet is the central navigation tool for the workbook. It contains a list of all the templates in alphabetical order. Click on the name of any template to go to its worksheet. You may also use the tabs you will find at the bottom of the worksheets to navigate throughout the workbook. These tabs are arranged by CA-PMM stages. A map of the toolkit can be found the CA-PMM Reference Manual on pages 30-34.

8. There are several navigation buttons on the left side of each worksheet:

- Top of the Page – takes the user to the top of the page
- Clear Entries – deletes text from all text fields
- Print Worksheet – prints the worksheet to the default printer. If you prefer to choose a different printer you can also use the standard Excel print function.
- Copy Responses – copies the responses for pasting in whatever application is chosen
- Send to Word – sends the responses to a Word (.dot) file called PMMToolkit .dot. Editing is easier and all text is transferred even if it does not appear in the text field in Excel. The downside is that each worksheet becomes a separate file. When the text is sent to Word, the PMMToolkit.dot file will appear in the program tabs at the bottom of the screen. Save it as a .doc file in the folder with the CA-PMM Toolkit and name it appropriately. Then do the editing. See the following instructions.

1. Open the PMMToolkit.dot file
2. Save it as .dot file as follows:
 - Word 2003 – C:\Documents and Settings
 - Word 2007 –
 - Right click on the .dot file
 - Click on Save as
 - Double click Computer

- Double click on C drive
 - Double click on Documents and Settings
 - Click on save
 - The file will save as PMMToolkit without an extension
- Acronyms – takes the user directly to the Acronyms worksheet
 - Inventory – takes the user directly to the Template Inventory
 - The red navigation buttons moves the user to the desired section within the worksheet

Using the Workbook

9. Start using the project workbook file by completing the Project Information Sheet. It is used to record the basic information about the project. Certain information is automatically populated to the individual templates. *[NOTE: To ensure smooth operation of the various worksheet buttons, be sure to click away from any active cell (e.g., a cell in which data has been entered), selecting another cell on the same worksheet as the button.]*

10. Cells that are automatically populated are shaded in grey. To start a new line of text at a specific point in a cell, click where you want to break the line, and then press ALT+ENTER.

11. Most templates contain notes with specific instructions or helpful information. The presence of a note is indicated by a tiny red triangle in the upper right hand corner of a gray shaded field. Move the pointer to the cell with the red triangle, and the additional information will appear.

12. A number of worksheets will perform calculations based on data entered. Until data is entered, there might be unusual symbols on the worksheet (e.g., #DIV/0!). These will be replaced by computed values as data is entered in the worksheet.

13. Some worksheets also use color coding to aid in interpretation of results. For example, the "Vital Signs" worksheet uses red, yellow, and green to indicate the "health" of each sign. The appropriate colors will appear as worksheet entries are made.

14. In cases, where it is necessary to use multiple copies of individual worksheets for a project, there are individual files of the following worksheets in addition to those included in the toolkit: Concept Statement, Complexity Assessment, Status Report, and Required Skill Gap Plan. The Concept Statement is included in SIMM Section 17 B. The remaining worksheets are included in SIMM Section 17 D.

Excel 2003: To make a copy of a specific worksheet, click on the Excel® "Edit" menu and select "Move or Copy Sheet..." In the dialog box that appears, be sure to check the "Create a Copy" box and indicate where the copy should be placed. The name of the project will have to be entered manually on the copy of the worksheet.

Excel 2007: Directions for moving or copying worksheets are included in the Excel® Help function.

Saving and Exiting

15. Excel 2003: To save your work, simply use the standard Excel® file menu.

Excel 2007: To save your work, click on the Office button and select Save.

Tip: the workbook will always open up to the main menu, but the individual worksheets will open where last saved.

Printing

16. To print individual worksheet or the entire workbook, by selecting the appropriate command:

Excel 2003: Select from the Excel® print menu or from the navigation buttons on the left side of the templates.

Excel 2007: Select the Office button and click print.

Every effort has been made to ensure accurate printing, but do a "Print Preview" before printing. Settings for individual printers will vary, so small adjustments may have to be made.

Contact Us

17. If you have any questions regarding the use of any particular template as it pertains to your project, please feel free to contact your OCIO Manager.